

## State Retirement Plans for Classified Substitutes

*As a classified substitute in a Washington State public school district or educational service district, you may be eligible to apply for service credit in the School Employees' Retirement System (SERS). This is an important optional benefit that can have a significant impact in your retirement years. **Please retain this information for future reference.***

1. **Who is a classified substitute? WAC 415-110-010(9)**
  - ◆ A classified employee who is employed as a substitute for an absent employee or working in an ineligible position.
2. **How does a classified substitute establish membership?**
  - ◆ You must work a cumulative total of 70 or more hours in at least five months in all positions during a school year (September – August)
  - ◆ Membership is established at the time of payment, not at the time service is rendered.
3. **What service qualifies for purchase after membership established?**
  - ◆ All creditable service months earned on or after July 27, 2003.
4. **When do I apply?**
  - ◆ You can apply for service credit any time after the end of the school year (August 31) in which the service was rendered.
  - ◆ If you pay for the credit during the period from September through February immediately following the school year in which service was rendered, you pay no interest.
5. **How do I apply?**
  - ◆ Pick up the SERS Plan 2 or Plan 3 application packet titled *The Classified Substitute's Guide to Obtaining Service Credit* from your payroll office at the end of the school year. The application packet is also available on the DRS Web site at [www.drs.wa.gov](http://www.drs.wa.gov)
  - ◆ You must submit the *Classified Substitute's Application for Service Credit* along with your quarterly reports. Note: Quarterly reports are required only if you are purchasing service credit for the period July 27, 2003 through August 31, 2004.
  - ◆ All school districts are required to provide substitutes with quarterly reports. Many school districts issue reports on a monthly basis.
  - ◆ DRS only accepts reports issued by your employer(s). Each report must include:
    - Your name, address, Social Security Number and your employer's name;
    - The number of hours you worked each month, totaled by month;
    - The amount of compensation you earned each month, totaled by month;
    - The signature of the payroll officer or person who is authorized to verify the report.
  - ◆ If you were employed in more than one school district or educational service district, be sure to submit all reports to DRS at the same time.
  - ◆ Plan 3 members must also complete a *Plan 3 Member Information Form* selecting a contributing rate option and investment program for their contributions at the time they submit their applications. A form is included with the application.

6. **How do I pay?**

- ◆ Payment must be made in full in order to receive the service credit and must be completed prior to retirement.
- ◆ If you make payment during the period September through February immediately following the school year in which the service was rendered, you pay no interest. If payment is made after the last day of February, interest will be charged.

7. **Things to remember**

- ◆ Members of all plans are advised to maintain their *Beneficiary Designation Form*. Changes in your marital status may void your beneficiary form.
- ◆ Members of all plans are advised to maintain a current address with their employers at all times. Tax documents and account statements relating to your pension are mailed to the address provided by your employer.

8. **Is a SERS retiree allowed to draw a pension benefit and work as a substitute?**

- ◆ Retirees are allowed to work as substitutes. For more information read the DRS brochure, *Thinking About Working After Retirement?* available from your employer or the DRS Web site: [www.drs.wa.gov](http://www.drs.wa.gov)